

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Attorney: Lisa M. Horton, for Conservator Kendra L. Brenson

Status Hearing Re: Establishment of Conservatorship in Texas; Final Account

Cont. from 10161 121514, 020915, 051215, 051215, 060215	4,
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	Ì
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	
Status Rpt	Χ
UCCJEA	
Citation	
FTB Notice	

KENDRA L. BRENSON, sister, was appointed Successor Conservator of the Person and Estate on 8/2/2007.

Order Fixing Residence Outside the State of California filed on 6/18/2014 finds the residence of the Conservatee shall be [street address omitted], Conroe, Texas; and that conservatorship of the person and estate or its equivalent shall be commenced in the state of new residence within 4 months of the date of this order. Four months from the date of the Order Fixing Residence expired on 10/18/2014.

Status Hearing Report filed by Attorney Lisa Horton on 5/28/2015 for the previous status hearing states:

- On 5/7/2015, she mailed the exemplified copy of the Court file to the Texas attorney;
- On 5/11/2015, she called the paralegal at the Texas firm; she received an email from the paralegal on 5/12/2015, stating that they will file the exemplified copy with the Court that day, and they anticipated getting a hearing date on 5/21 or 5/28 (copy of email attached);
- On 5/20/2015, she emailed the paralegal and received on response; 5/22/2015, she emailed the paralegal again on 5/22/2015 for the status, and she replied that the Texas guardianship [the Texas term for conservatorship] hearing was 6/18/2015 (copy of email attached);
- She changed the ending date of the final accounting to 6/19/2015 and needs the May statement from Wells Fargo to complete the accounting.

NEEDS/PROBLEMS/COMMENTS:

<u>Continued from</u>
<u>6/2/2015</u> per request of counsel.

The following issues from the last hearing remain:

- Need proof of the establishment of conservatorship of the person and estate or its equivalent in the State of Texas.
- 2. Need Second and Final account of the conservatorship pursuant to Probate Code § 2620 et seq.

Note for background:

Minute Order dated 4/6/2015 states the Court grants a 30 day continuance, but Counsel is to start inquiries regarding the Conservatorship in Texas immediately.

Reviewed by: LEG
Reviewed on: 7/2/15

Updates:

Recommendation:

File 1 - Harris

1

2

Case No. 07CEPR01275

Attorney

Donald Lewis McDaniels (CONS/PE) Case No. 070
Bagdasarian, Gary G. (for Bruce Bickel – successor conservator of the Estate) Probate Status Hearing Re:Filing First Accounting

Αç	je: 49	BRUCE BICKEL, was appointed	NEEDS/PROBLEMS/COMMENTS:
DC	DB: 08/14/65	Successor Conservator of the Estate on	
		08/08/13.	 Need First Account and
		_	Report of Successor
		ROBERT N. LOWDER, II and MARCIA D.	Conservator.
Co	ont. from	LOWDER, were appointed successor Co-Conservators of the Person on	
	Aff.Sub.Wit.	10/13/10.	
	Verified	7	
	Inventory	23 rd and Final Account of Former	
	PTC	Conservator of the Estate, WELLS FARGO , was approved on 01/27/14.	
	Not.Cred.	- TAKOO, Was approved on 01/2//14.	
	Notice of	NOTICE OF STATUS HEARING filed	
	Hrg	06/01/15 set this matter for status re	
	Aff.Mail	filing of the First Account by successor	
	Aff.Pub.	Conservator of the Estate. Clerk's Certificate of Mailing indicates that the	
	Sp.Ntc.	Notice of Status Hearing was mailed to	
	Pers.Serv.	Gary Bagdasarian on 06/01/15.	
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
_	Aff. Posting	4	Reviewed by: JF
	Status Rpt	_	Reviewed on: 07/02/15
	UCCJEA		Updates:
	Citation	_	Recommendation:
	FTB Notice		File 2 - McDaniels

Case No. 09CEPR00559

Attorney Hopper, Cindy J (for Frances Ramos – maternal great grandmother/Petitioner)
Petition - Appoint Guardian

Ag	e: 7 mos.		TEMPORARY EXPIRES 07/07/15	NEEDS/PROBLEMS/COMMENTS:
			FRANCES RAMOS, maternal greatgrandmother, is Petitioner.	This Petition pertains to Niahlee Lowe, Frances Ramos was appointed guardian of Savanna
Со	nt. from		Father: RUSSELL LEE LOWE, III – personally served on 05/08/15	on 09/23/09.
	Aff.Sub.Wit.		Mother: ROSE HERNANDEZ – personally	
√	Verified		served on 06/03/15	
	Inventory		33.7.3.3.7.3.3,7.3.7.3	
	PTC Not Cred		Paternal grandfather: RUSSELL LEE LOWE,	
✓	Notice of		JR. – served by mail on 05/21/15	
	Hrg		Paternal grandmother: DORA BAGDA – served by mail on 05/21/15	
✓	Aff.Mail	w/	Served by mail on 03/21/13	
	Aff.Pub.	,	Maternal grandfather: JOHN HERNANDEZ –	
	Sp.Ntc.		served by mail on 05/21/15	
√	Pers.Serv.	w/	Maternal grandmother: SYLVIA ZAPATA – served by mail on 05/21/15	
✓	Conf.		served by mail on 05/21/15	
	Screen		Petitioner states [see Petition for details].	
✓	Letters			
✓	Duties/Supp		Court Investigator Julie Negrete filed a report on 06/30/15.	
	Objections		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
	Video			
√	Receipt			
	CI Report 9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 07/02/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 3 – McJamerson/Lowe

Attorney

Accounting Second Account and Report of Trustees and Petition for Its Settlement

	Accounting	Second Account and Repo	ort of Irustees and Petition for its Settlement
Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
			CONTINUED TO 07/21/15
			Per request of Counsel
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of			
Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf.			
Screen			
Letters			
Duties/Supp			
Objections			
Video			
Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: JF
Status Rpt			Reviewed on: 07/01/15
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 4 - Tutelian

Petitioner: Edward Molloy, III (Pro Per Administrator)

First Amended First and Final Account and Report of Administrator; and Petition for Settlement, Allowance of Commissions and Fees, and Final Distribution

DC	D: 5/23/2013	EDWARD MOLLOY, III , son and Administrator, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner. Account period: 5/23/2013 – 1/31/2015	Note: Schedule D, Property on Hand lists cash of \$35,424.21 remaining in the estate. Based
Co	nt. from	Accounting - \$148,817.89	upon that sum, less the
	Aff.Sub.Wit.	Beginning POH - \$148,817.89	Administrator's fee of \$1,919.15
1	Verified	Ending POH - \$ 46,724.21	and the reimbursement to the
Ė	Inventory	(\$35,424.21 is cash; real property foreclosed;	Administrator of \$375.06, the
✓	-	excess funds of \$47,978.69 received from	balance of cash remaining for
1	PTC	foreclosure;)	distribution calculates as \$33,130.00, which when
	Not.Cred.	Administrator - \$1,919.15	divided at 50% to each
		(less than statutory)	distributee calculates as
✓	Notice of	()	\$16,565.00 in cash to each.
	Hrg	Reimbursement - \$375.06	Proposed order has been
✓	Aff.Mail W	(reimbursement to Administrator, itemized on	interlineated to reflect this
	Aff.Pub.	Exhibit E; balance remaining due from total	corrected cash distribution.
	Sp.Ntc.	costs of \$2,715.33, of which \$2,340.27 was	
	Pers.Serv.	already paid without Court order; for funeral	
	Conf.	expenses, property maintenance, filing fees,	
	Screen	publication; receipts attached;)	
	Letters 021114		
	Duties/Supp	Distribution pursuant to intestate succession is	
	Objections	to:	
	Video	• EDWARD MOLLOY, III – Ford Ranger,	
	Receipt	appraised at \$2,000.00 ; Aluminum Fishing	
	CI Report	Boat, appraised at \$500.00; Household	
	9202	furniture, appraised at \$3,000.00; and	
✓	Order	\$16,565.00 cash.	
	Aff. Posting	DANIEL D. MOLLOY – Yamaha Scooter,	Reviewed by: LEG
	Status Rpt	appraised at \$2,500.00; Appliances,	Reviewed on: 7/2/15
	UCCJEA	electronics, misc., appraised at \$3,300.00;	Updates:
	Citation	and \$16,565.00 cash .	Recommendation:
√	FTB Notice		File 5 - Molloy

Atty Atty Ricardo Garcia (pro per, former Administrator)

Heather Kruthers (for Successor Administrator, Public Administrator)

Order to Show Cause RE: Failure to File the Inventory and Appraisal

DOD: 06/30/11		RICARDO GARCIA, brother, was	NEEDS/PROBLEMS/COMMENTS:
		appointed as Administrator with Limited	
		IAEA and without bond on 07/21/14.	
			Continued from 5/26/15. Minute
	nt. from 022415,	Letters of Administration were issued on	order states Ricardo Garza, former
	2615	07/24/14.	Administrator, was present this
032			morning but left prior to the case
	Aff.Sub.Wit.	Minute order dated 1/13/15 set an Order to Show Cause to Ricardo Garcia	being called due to a medical
	Verified	as to why he should not be removed as	appointment. The Public Administrator has filed the inventory
	Inventory	Administrator of the Estate for failure to	and appraisal; Ms. Kruthers need not
	PTC	file the Inventory and Appraisal. Mr.	appear on 7/7/15. Mr. Garza is to be
	Not.Cred.	Garcia is ordered to be personally	present in court on 7/7/15. – Copy of
	Notice of	present in court on 2/24/15.	the minute order was mailed to
	Hrg	- Copy of the minute order was	Ricardo Garza on 5/26/15.
	Aff.Mail	mailed to Ricardo Garcia on	
	Aff.Pub.	1/13/15.	
	Sp.Ntc.	At the hearing on 2/24/15 the Court	
	Pers.Serv.	found good cause to remove Ricardo	
	Conf.	Garcia as Administrator and appointed	
	Screen	the Public Administrator. Mr. Garcia	
	Letters	was ordered to turn over any and all	
	Duties/Supp	papers, documents and information	
	Objections	pertaining to the estate to the Public Administrator within a week.	
	Video	Furthermore, the Court orders that Mr.	
	Receipt	Garcia no make any more rent	
	CI Report	payments of any kind to his mother;	
	9202	payments will now go to the Public	
	Order	Administrator.	
	Aff. Posting	Inventory and Appraisal filed by the	Reviewed by: KT
	Status Rpt	Inventory and Appraisal filed by the Public Administrator on 4/3/15 showing	Reviewed on: 7/2/15
	UCCJEA	real property valued at \$200,000.00	Updates:
	Citation		Recommendation:
	FTB Notice		File 6 - Blanco

9 Christina DeLaCruz Irlas (Estate)

Case No. 14CEPR00634

Attorney: Bruce A. Neilson (for Petitioners Irene Irlas and Ruben Irlas)

Amended Petition for Letters of Administration; Authorization to Administer Under Limited IAEA (Prob. C. 8002, 10450)

petitioner and request appointment as Administrators without bond. Cont. from 042815, 052615 Aff.Sub.Wit. Decedent died intestate. Decedent died intestate. The mandatory judicial forms. As of 7/2/15 the issue remains: Need Waiver of Born heirs. (Waiver of Born filled for 8 of the 12 heirs.) Notice of Hrg Personal property - \$15,000.00 Total - \$135,000.00 Total - \$135,000.00 Total - \$135,000.00 Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. Note: If the petition is gone hearings will be set as fellows. N	e set at must be on council following d from all ad have been
Cont. from 042815, 052615 Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. Notice of Hrg ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Limited IAEA – o.k. Streen Order states bond will b \$15,000.00; all waivers the mandatory judicial forms. As of 7/2/15 the issue remains: 1. Need Waiver of Bon heirs. (Waiver of Bon filed for 8 of the 12 heigh they are not on the Judicial Council form waiver of bond from the mandatory Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form waiver of bond from the mandatory Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form waiver of bond from the mandatory Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh the set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they are not on the Judicial Council form or bond set at 15 heigh they ar	e set at must be on council following d from all had have been
Cont. from 042815, 052615 Aff.Sub.Wift. Decedent died intestate. Stimated value of the estate: Personal property - \$15,000.00 Motoce of Hrg Probate Referee: Steven Diebert. Stimated value of the bond from the property of the personal property Stoppers Sto	nust be on council following d from <u>all</u> d have been
Cont. from 042815, 052615 Aff.Sub.Wit.	council following ad from <u>all</u> ad have been
Decedent died intestate. Decedent died intestate. Aff.Sub.Wit.	e following and from <u>all</u> and have been
Aff.Sub.Wift. ✓ Verified Inventory PTC Not.Cred. Notice of Hrg ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Decedent died intestate. Residence: Selma Publication: Selma Enterprise. Inventory Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs.) Need Waiver of Boncheirs. (Waiver of Boncheirs) 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Piblication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Piblication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Place For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Place For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Place For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Place For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Place For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. (Waiver of Boncheirs) Need For Selma Place For Selma Publication: Selma Enterprise. 1. Need Waiver of Boncheirs. Need For Selma Place For	d from <u>all</u> d have been
✓ Verified Residence: Selma Inventory Publication: Selma Enterprise. Not.Cred. Estimated value of the estate: Personal property - \$15,000.00 Real property - \$120,000.00 Total - \$135,000.00 Aff.Pub. Note: If the petition is ghearings will be set as form or bond set at the property of the estate: Pers.Serv. Probate Referee: Steven Diebert.	nd have been
Inventory Publication: Selma Enterprise. 1. Need Waiver of Born heirs. (Waiver of Born heirs. (Waiver of Born filed for 8 of the 12 hearings will be set as form of the publication: Selma Enterprise. 1. Need Waiver of Born heirs. (Waiver of Born heirs. (Waiver of Born filed for 8 of the 12 hearings will council form waiver of bond from the mandatory Judicial Council form or bond set at set in the petition is gone hearings will be set as form or bond set at set in the filing of the bond from the publication: Selma Enterprise. 1. Need Waiver of Born heirs. (Waiver of Born heirs. (Waiver of Born heirs.) 1. Need Waiver of Born heirs. 1. Need Waiver of Born hei	nd have been
PTC Not.Cred. Notice of Hrg Aff.Mail V/ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen PTC Not.Cred.	
Notice of Hrg	_ ! I
Notice of Hrg	
Notice of Hrg	,
Aff.Mail W/ Total - \$120,000.00 the mandatory Judic form or bond set at \$1.00	,
✓ Aff.Mail W/ ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Total - \$135,000.00 form or bond set at \$1.00 Note: If the petition is gone hearings will be set as form or bond set at \$1.00 Note: Wednesday, August 9:00 a.m. in Department the filling of the bond set at \$1.00 Note:	
Sp.Ntc. Probate Referee: Steven Diebert. Note: If the petition is good hearings will be set as form the filling of the bond in the filling of the bond	
Sp.Ntc. Probate Referee: Steven Diebert. hearings will be set as form Screen Probate Referee: Steven Diebert. hearings will be set as form Wednesday, August 9:00 a.m. in Department the filling of the bond	ranted status
Pers.Serv. Conf. Screen 9:00 a.m. in Departre the filling of the bond	
Screen 9:00 a.m. in Departr	
the filing of the bond	·
the filing of the bond	
	d, if required.
• Wednesday, Decen	
✓ Duties/Supp at 9:00 a.m. in Depo	
Objections for the filing of the ir appraisal.	iventory and
Video	
Receipt • Wednesday, Septen	
CI Report at 9:00 a.m. in Depo	
9202 for the filing of the fi petition for final distr	
II.∡ I Order I I	
Pursuant to Local Rule 7	
required documents and	
days prior the date set	
hearing will come off control of the	
Aff. Posting Reviewed by: KT	reguired.
Status Rpt Reviewed by: Ki	'
UCCJEA Updates:	'
Citation Recommendation:	,
FTB Notice File 9 - Irlas	
	·

10 John Anthony Marchese, Sr. (Estate) Case No. 14CEPR00894

Attorney Silva, Bradley A. (for John Franklin Marchese – Executor – Petitioner)

Waiver of Accounting and Petition for Final Distribution Under Will and for Allowance of Statutory Attorney's Fees

DO	D: 1/9/14	JOHN FRANKLIN MARCHESE, Son and	NEEDS/PROBLEMS/COMMENTS:
		Executor with Full IAEA without bond, is	
		Petitioner.	
		•	
		Accounting is waived	
	Aff.Sub.Wit.	I&A: \$293,138.25	
~	Verified	POH: \$314,526.14 cash plus savings bonds	
~	Inventory		
~	PTC	Executor (Statutory): \$8,862.77	
~	Not.Cred.	Attorney (Statutory): Waived	
~	Notice of	1	
	Hrg	Closing: \$2,500.00 (accountant, etc.)	
>	Aff.Mail w/o		
	Aff.Pub.	Distribution pursuant to the decedent's will:	
	Sp.Ntc.	Will.	
	Pers.Serv.	John Franklin Marchese and Ronald	
	Conf.	Thomas Marchese, as Successor	
	Screen	Co-Trustees of the John A. Marchese and	
~	Letters	Julie R. Marchese Living Trust dated	
	Duties/Supp	4/10/91: \$303,163.37	
	Objections		
	Video		
	Receipt		
	CI Report		
~	9202		
~	Order		
	Aff. Posting	_	Reviewed by: skc
	Status Rpt	 	Reviewed on: 7/2/15
	UCCJEA	 	Updates:
	Citation	1	Recommendation: SUBMITTED
	FTB Notice		File 10 - Marchese

10

11 Atty Josiah Athen Garza (GUARD/P)
Aguilar, Ilda (pro per Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			Temporary Expires 7/7/15	NEEDS/PROBLEMS/
			ILDA AGUILAR, maternal grandmother, is petitioner.	COMMENTS:
			1.27.7.7.2 (1.2) Maramar granamemen, a permenen	
<u> </u>	ont. from 12091	4	Please see petition for details.	Continued from 6/9/15.
	0315, 031715,	٦,	Court Investigator Report filed on 12/2/14	Minute order states Mr. Garza is again directed
04	2815, 060915		Coon investigator Report inca on 12/2/14	to have his objections
	Aff.Sub.Wit.		Objection of father, Gabriel Garza, filed on 4/7/15	properly served. The
✓	Verified			Court orders that Gabriel
	Inventory		Declaration of Petitioner Ilda Aguilar filed on 5/5/15.	Garza have supervised visits every Saturday
	PTC		Declaration filed 7/2/15	from noon to 3 p.m. at
	Not.Cred.			Kirkoff Park in Kerman.
✓	Notice of Hrg			Need proof of
✓	Aff.Mail	W/		service showing the objections have
	Aff.Pub.			been served on:
	Sp.Ntc.			a. Ilda Aguilar
✓	Pers.Serv.	W/		(petitioner) b. Maricruz Aguilar
✓	Conf. Screen			(mother)
✓	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Bossint			
_	Receipt CI Report			
<u> </u>	-			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 7/2/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 11 - Garza

Petitioner Gilbert R. Chavez Jr. (Pro Per – Step-Father – Petitioner)

Petitioner Amy Nicole Chavez (Pro Per – Wife of Step-Father – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
				Continued from 6/9/15
Со	nt. from 06091	5		Need Notice of Hearing and proof of personal
	Aff.Sub.Wit.			service of Notice of
~	Verified			Hearing with a copy of the
	Inventory			temp petition at least five
	PTC			court days prior to the hearing per Probate Code
	Not.Cred.			§2250(e) on:
	Notice of Hrg	Х		- Vanessa M. Vasquez (Mother)
	Aff.Mail			,
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	Х		
~	Conf.			
	Screen			
>	Letters			
>	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 7/2/15
>	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 12 - Vasquez

13 Beatrice Marie Woof (Estate)

Case No. 15CEPR00094

Attorney: Heather H. Kruthers (for Administrator, Public Administrator)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

1	Trobate states freating KE. Timing of the	
		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR. Inventory and
		appraisal filed on 6/25/15.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 7/2/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13 - Woof

Vivian Dorothy Vaughan (Estate)

Standard, Donna M. (for Jonathan Vaughan – Petitioner)

Petition for Probate of Will and for Letters of Administration Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 7-1-06		JONATHAN VAUGHAN, Son, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner and requests appointment as Administrator with Limited IAEA without bond.	Minute Order 6/2/15: Continued to allow time for the publication defect to be cured.
	nt from 032315, 0415, 060215	,	Limited IAEA – ok	The following issue remains noted:
→	Aff.Sub.Wit.		Decedent died intestate	The Fresno Bee publication used outdated language regarding notice to creditors. See Probate Code §8100 and
	Inventory PTC		Residence: Miramonte, CA Publication: Fresno Bee	Form DE-121, Notice of Petition to Administer Estate, which was updated
	Not.Cred.		Estimated value of estate:	1/1/13. The Court may require amended publication.
_	Notice of Hrg		Personal property: Unknown, if any Real property: \$78,000.00	Note: If granted, the Court will set status hearings as follows:
→	Aff.Pub.	W	Probate Referee: Rick Smith	Tues, Aug. 18, 2015 for the filing of bond, if required
	Sp.Ntc. Pers.Serv.		Petitioner requests bond be waived	Tues, Dec. 8, 2015 for the filing of the inventory and appraisal
	Conf. Screen		because the estate consists solely of real property upon which Petitioner	Tues, Oct. 11, 2016 for the filing of the first account or petition for final
>	Letters Duties/Supp		currently resides. Waivers have been distribution.	
	Objections Objections		however, Petitioner requests that if the property is sold, any proceeds be	If the proper items are on file pursuant to local rules, the status hearings may be
	Video Receipt		placed into a blocked account.	taken off calendar.
	CI Report			
	9202			
~	Order			Reviewed by: skc
	Aff. Posting Status Rpt			Reviewed by: SRC
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 14 - Vaughan
	<u> </u>			1.4

Cierra Rayann Jurado (GUARD/P) Case No. 15CEPR00153 Hinojosa, Eva Antonia (pro per – maternal great-aunt) Petition for Appointment of Guardianship of the Person (Prob. C. 1510) 15 Case No. 15CEPR00153

Petitioner

Age: 1	TEMPORARY EXPIRES 07/07/15	NEEDS/PROBLEMS/COMMENTS:
	EVA ANTONIA HINOJOSA , maternal greataunt, is Petitioner.	CONTINUED FROM 06/09/15
Cont. from 042815, 060915	Father: MANUEL JURADO – personally served on 03/02/15	As of 07/01/15, nothing further has been filed and the following notes remain:
Aff.Sub.Wit. ✓ Verified Inventory PTC	Mother: ALESHA FLORES – Consent & Waiver of Notice filed 03/03/15 Paternal grandfather: MANUEL JURADO, SR. – Consent & Waiver of Notice filed 05/22/15	Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of
Not.Cred. ✓ Notice of Hrg Aff.Mail × Aff.Pub.	Paternal grandmother: ELIDA MOLINA – Consent & Waiver of Notice filed 05/22/15 Maternal grandfather: DANNY FLORES Maternal grandmother: DONNA ALCANTAR -	Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Danny Flores (maternal
Sp.Ntc. ✓ Pers.Serv. W/ ✓ Conf. Screen ✓ Letters	Consent & Waiver of Notice filed 03/03/15 Siblings: ALICIA JURADO (26), VICTORIA JURADO (24), ELIZABETH JURADO (20), MANUEL JURADO (17) – Consent & Waiver of Notice filed 05/22/15, MORGAN GONZALEZ	grandfather) b. Alicia Jurado (sibling) c. Victoria Jurado (sibling) d. Elizabeth Jurado (sibling)
✓ Duties/Supp Objections Video Receipt ✓ CI Report	(7), ROSALYN (3) Petitioner states that she has raised Cierra since birth and that the parents agree that she raise Cierra.	
9202 ✓ Order Aff. Posting Status Rpt	Court Investigator Samantha Henson filed a report on 04/21/15.	Reviewed by: JF Reviewed on: 07/01/15
Citation FTB Notice		Updates: Recommendation: File 15 - Jurado

15

17 Atty Matthew H. Tange (Estate) Case No. 15CEPR00270
Willoughby, Hugh W. (for Christopher Tange – First Cousin – Petitioner)
Status Hearing RE: Proof of Bond

J.	idios nediling kt. Floor of Bolid	
		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
		Bond filed 5/19/15 Letters issued 5/29/15
Aff.Sub.Wit.		Leners 1330eu 3/27/13
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 7/2/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 17 - Tange

17

18 Guadalupe R. Juarez aka Maria Guadalupe R. Juarez (Estate) Case No. 15CEPR00293

Winter, Gary (for Velia Juarez, Velia – Daughter – Petitioner) **Attorney**

First Amended Petition for Probate of Will and for Letters Testamentary; Authorization to Administer

10450)

	Under	IAE	A (Prob. C. 8002, 1
DO	D: 12/28/14		VELIA JUAREZ,
			and named Ex
			without bond, i
			and requests a
			as Administrato
~	Aff.Sub.Wit.		Annexed with I without bond.
	Verified		wiirioor boria.
			Full IAEA – need
	Inventory PTC		re-publication
	Not.Cred.		Will dated 8/20
~	Notice of		D: - D -
~	Hrg		Residence: Del Publication: Ne
_	Aff.Mail	W	re-publication
	Aff.Pub.	Χ	To position
	Sp.Ntc.		Estimated valu
	Pers.Serv.		Real property:
	Conf.		
	Screen		Probate Refere
> >	Letters		Rick Smith
>	Duties/Supp		Petitioner state
	Objections		not have the o
	Video		A Proof of Subs
	Receipt		Witness was file
	CI Report		by Sal Blanco,
	9202		witnessed the s
~	Order		the will as well
			the will. A copy attached.
			anachea.
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		

FTB Notice

Daughter xecutor is Petitioner appointment or with Will Full IAEA

d

0/91

el Rey, CA eed

e of estate: \$300,000.00

ee:

es she does riginal will.

scribing ed 5/13/15 who signing of as prepared y of the will is

NEEDS/PROBLEMS/COMMENTS:

- 1. Petitioner states she does not have the original will, but does not state why, and does not address the presumption under Probate Code §6124 that the testator destroyed the will with intent to revoke if original not found. Proof of Subscribing Witness relates to the original signing only and does not address this presumption. Need further information.
- 2. Need publication pursuant to Probate Code §8120. Note: Publication filed 4/17/15 in connection with the prior petition is not adequate since this is an amended petition that was given a new hearing date.
- 3. Petitioner requests appointment as "Administrator with Will Annexed;" however, if the lost will is admitted to probate, it appears Petitioner would more appropriately be appointed as Executor, since she is named Executor in the will.
- 4. If granted, need order pursuant to Probate Code §8223, complete with terms of will.

Note: If granted, the Court will set status hearings as follows:

- Tues, Aug. 18, 2015 for the filing of bond, if required
- Tues, Dec. 8, 2015 for the filing of the inventory and appraisal
- Tues, Oct. 11, 2016 for the filing of the first account or petition for final distribution.

If the proper items are on file pursuant to local rules. the status hearings may be taken off calendar.

Reviewed by: skc **Reviewed on:** 7/2/15

Updates:

Recommendation:

File 19 - Juarez

19 Daniel J. and Virginia L. Duggan Revocable Trust

Case No. 15CEPR00308

Attorney Perryman, Mark D. (of Carlsbad, CA, for Mark Duggan – Petitioner)

Petition for Findings and Orders to Compel an Accounting or Provide Information on the Trust:

Confirm the Creation and Funding of Trust B; and Instructions on Validity of Trust Amendment

	min me creand	πи	na Funding of Irust B; and Instructions on Validity of Iru	ai Ailieliullielli
	ginia L. Duggar D: 4/17/12	n	See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
				Minute Order 5/5/15:
				Mr. Tomassian requests
	nt. from 050515			a continuance for
<u> </u>				discussions.
l 	Aff.Sub.Wit.			The fellowing issues
~	Verified			The following issues remain noted:
	Inventory			remain noiea.
	PTC			1. The Court may
	Not.Cred.			require notice to
~	Notice of			Therese Tiab, the
	Hrg			second named
~	Aff.Mail	W		successor trustee,
	Aff.Pub.			pursuant to Probate
	Sp.Ntc.			Code §17203.
	Pers.Serv.			2. Need proposed
	Conf.			order pursuant to
	Screen			Local Rule 7.1.1.F.
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 7/2/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 19 - Duggan

21 Jerome Brown, JR (GUARD/P) Case No. 15CEPR00472 **Petitioner**

Arlene Jones Hawkins (Pro Per – Paternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp	X	See petition for details.	1. Petitioner does not provide the names of the other grandparents (paternal grandfather and maternal grandmother and grandfather) and has not served them with Notice of Hearing pursuant to Probate Code §1510 or filed any declaration of due diligence. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing or consent and waiver of notice or declaration of due diligence for the paternal grandfather and maternal grandmother and grandfather.
	Objections			
	Video Receipt			
~	CI Report			
~	Clearances			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 7/2/15
~	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 21 – Brown

22 Riley Hayslett (GUARD/P)

Case No. 15CEPR00478

Attorney

Stern, Rhonda (for Brandy Tschappler – Maternal Grandmother – Petitioner) Petition for Appointment of Guardian of the Person (Prob. Code §1510)

			See petition for details.	NE	EDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			1.	If this petition goes forward, need continuance for court investigation, clearances pursuant to Probate Code §1513.
	Verified Inventory			2.	If diligence is not found, need
	PTC				notice to paternal grandfather pursuant to Probate Code
	Not.Cred.				§1511.
~	Notice of Hrg			3	Need Letters.
~	Aff.Mail	W		0.	Need Leners.
	Aff.Pub.				
	Sp.Ntc.				
~	Pers.Serv.	W			
~	Conf.				
	Screen				
_	Letters				
~	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report	Χ			
	9202	Χ			
~	Order				
	Aff. Posting				viewed by: skc
	Status Rpt				viewed on: 7/2/15
~	UCCJEA				dates:
	Citation				commendation:
	FTB Notice			File	e 22 - Hayslette

Soares, Joseph F., of Tulare (for Petitioner Jesus aka Jesse Torres) Attorney

Petition to Determine Succession to Real and Personal Property

DC	D: 10/15/2014		SANTOS TORRES and JESSE TORRES,	NEEDS/PROBLEMS/COMMENTS:
			sons, are Petitioners.	
Co	ont. from		40 days since DOD.	Note: Related special administration for the Estate of Lupe Pendergraft, Case 15CEPR00557, heard on 7/6/2015 may have required
	Aff.Sub.Wit.			continuance due to the need for
√	Verified		No other proceedings.	service of notice of hearing. The instant petition is contingent upon
✓	Inventory		·	the granting of the special
	PTC		607 722 40	administration sought for the purpose of executing an Affidavit Re
	Not.Cred.		& A - \$96,633.48	Real Property to transfer the 25% real
1	Notice of			property interest of the Decedent's
	Hrg		Decedent died intestate.	spouse to the Decedent for
✓		W/	Decedent died intestate.	distribution from the instant case.
	Aff.Pub.			1. Item 9(a)(2)(b) of the Petition
	Sp.Ntc.		Petitioner requests Court	states decedent's spouse is
	Pers.Serv.		determination that Decedent's 50%	deceased. Attachment 14 to the
	Conf.		interest in real property located at 5 th	Petition does not include the
	Screen		Street, Clovis, and [unspecified %]	name and date of death of
	Letters		interest in personal property, passes to	deceased spouse pursuant to Local Rule 7.1.1(D). (Note: this
	Duties/Supp		the petitioner pursuant to intestate	information is obtainable from
	Objections		succession.	Case 15CEPR00594; however, the
	Video			information should also be
	Receipt			contained in the instant Case
	CI Report			15CEPR00557.)
	9202			2 Attachment 11 to the Retition
✓	Order			2. Attachment 11 to the Petition does not state the amount of the Decedent's interest in the personal property as required per Item 11 of the Petition.
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 7/2/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 23 - Pendergraft
				23

Gian Chohan (Spousal) Case No. 15CEPR00558

Barco, Benny D. (for Bikramjit Singh Chohan – Surviving Spouse – Petitioner)

Spousal Property Petition (Prob. Code §13650)

DO	D: 4/20/11		BIKRAMJIT SINGH CHOHAN, Surviving	NE	EDS/PROBLEMS/COMMENTS:
			spouse, is Petitioner.	,	Attachment 9 lists six adults who
			No other proceedings	1.	were all given notice of this hearing, but does not state their
	Aff.Sub.Wit.		Decedent died intestate		relationship to the decedent. The Court may require clarification.
~	Verified		Petitioner states Petitioner and		coon may require claimeanon.
	Inventory		Decedent were married 3/4/62 prior to	2.	Need Order. See Local Rules
	PTC		the acquisition of the real property. The		7.1.1.F, 7.6.1.B, and 2.1.15.
	Not.Cred.		two pieces of real property were tilted		
~	Notice of		in the name of Decedent for financing purposes only. Community funds were		
	Hrg		used to acquire the property and fund		
~	Aff.Mail	W	the account and all contributions since		
	Aff.Pub.		the acquisition of the assets were		
	Sp.Ntc.		made with community funds. At all times Petitioner and Decedent		
	Pers.Serv.		considered the assets to be		
	Conf.		community property despite that		
	Screen		vesting shows in Decedent's name		
	Letters		alone.		
	Duties/Supp		Datition on the Country of the safety		
	Objections		Petitioner requests Court confirmation that Petitioner's one-half interest in the		
	Video		two pieces of real property belongs to		
	Receipt		Petitioner and that Decedent's one-		
	CI Report		half interest passes to Petitioner.		
	9202				
	Order	Χ			
	Aff. Posting				viewed by: skc
	Status Rpt			_	viewed on: 7/2/15
	UCCJEA				odates:
	Citation				commendation:
	FTB Notice			File	e 24 - Chohan

25

Case No. 15CEPR00559

Attorney

Susanna Khalatyan (Det. Succ)

Pascuzzi, Susan L. (for Edgar Khalatyan – son/Petitioner)

Petition to Determine Succession to Real Property

	D: 02/14/12		EDC AD KHALATYAN CODE:	NEEDS/PROBLEMS/COMMENTS:
	7D. 02/14/12		EDGAR KHALATYAN, son, is Petitioner.	NEEDS/FROBLEMS/COMMENTS.
			i emionei.	
			40 days since DOD.	
H			40 ddys siried DOD.	
Co	nt. from		No other proceedings.	
	Aff.Sub.Wit.		The enter proceedaings.	
✓	Verified		I&A - \$112,000.00	
	Inventory		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
	PTC		Decedent died intestate	
	Not.Cred.			
√	Notice of		Petitioner requests Court	
<u> </u>	Hrg		determination that decedent's	
✓	Aff.Mail	w/	100% interest in real property	
	Aff.Pub.		located at 4412 E. Ashcroft, Fresno,	
	Sp.Ntc.		passes to him pursuant to intestate	
	Pers.Serv.		succession.	
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 07/02/15
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 25 - Khalatyan

Petitioner Petitioner Manuel Torres (GUARD/P)
Valdez, Veronica (pro per – maternal aunt)

Gonzales, Victoria Elizabeth (pro per – maternal aunt)

Petition for Appointment of Temporary Guardian of the Person

Ag	e: 1		GENERAL HEARING: 08/26/15	NEEDS/PROBLEMS/COMMENTS:
			VICTORIA GONZALES and VERONICA VALDEZ, maternal aunts, are Petitioners.	Need Notice of Hearing. Need proof of personal
Со	nt. from		Father: UNKNOWN	service at least 5 court days before the hearing of Notice of Hearing with a copy of the
	Aff.Sub.Wit.		Mother: CHRISTINA TORRES	Petition for Appointment of
✓	Verified		Detaragle area do ero ato INIVNOVAN	Temporary Guardian of the
	Inventory		Paternal grandparents: UNKNOWN	Person <u>or</u> Consent & Waiver of Notice or Declaration of Due
	PTC		Maternal grandfather: MOSES TORRES	Diligence for:
	Not.Cred.		Maternal grandmother: ROSELLA	a. Christina Torres (mother)
	Notice of Hrg	Х	VILLAREAL	b. Father
	Aff.Mail		Petitioners state Manuel was placed in	
	Aff.Pub.		their care on 03/17/15 due to the	
	Sp.Ntc.		mother failing a drug test. Mother tested positive for meth and marijuana.	
	Pers.Serv.	Х	Since Manuel has been in their care his	
✓	Conf.		mother has only visited him once for	
	Screen		about an hour. Mother is homeless	
✓	Letters		and continues to use meth daily.	
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 07/02/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 27 - Torres

29 Jazmyne Fuller (GUARD/P)

Case No. 14CEPR00371

Attorney Attorney Pulido, Reynaldo Carrillo (for Antoinette Fuller – Guardian) Miller, James L (for Orrin Fuller – father)

Probate Status Hearing RE: Proof of Attendance of Anger Management Classes

Age: 6 **ANTOINETTE FULLER**, paternal aunt, was **NEEDS/PROBLEMS/COMMENTS:** appointed Guardian on 05/11/15. CONTINUED FROM 06/29/15 Minute Order from 05/11/15 set this matter for status and states: The Court **Note:** It does not appear that an Order Appointing Guardian of the grants the general petition forthwith. Cont. from 062915 The Court orders Orrin Fuller to enroll in Minor or Letters of Guardianship have Aff.Sub.Wit. Anger Management classes, and been submitted since the further orders that they are to take quardianship was granted on Verified precedence over other classes if there 05/11/15. Need Order and Letters. Inventory is a scheduling conflict. There is to be PTC no communication between Mr. Fuller Not.Cred. and the Guardian other than e-mail. Notice of The Court orders visitation on the first Hrg and third Sunday of each month from 10am to 4pm at CYS. Each party is Aff.Mail responsible for one-half of the costs of Aff.Pub. the visits, and there shall be no other Sp.Ntc. visits other than those through CYS. Pers.Serv. Conf. **Update on Minor's Progress** and Screen Guardian's Completions filed 06/18/15. Letters **Proof of Enrollment in Classes filed Duties/Supp** 07/01/15 by Orrin Fuller (father) **Objections** attaches proof of enrollment in 2 Video classes: Receipt 1) Coalition for Family Harmony – 16 **CI Report** week anger management program; and 9202 2) Coalition for Family Harmony – Order Batterer's Intervention Program Aff. Posting Reviewed by: JF **Reviewed on:** 06/23/15 Status Rpt **UCCJEA Updates:** Citation **Recommendation: FTB Notice** File 29 - Fuller

30 Gene Ray Chance (Estate)

Case No. 13CEPR00612

Atty Standard, Donna M (for Walter Sherwood Chance – Petitioner – Executor)

First Account and Report of Status of Administrator of Estate

DC	D: 10/16/2011		WALTER SHERWO)(
			petitioner.	
			Account period	d: '
Со	nt. from 051915		Accounting	
063	3015		Beginning POH	
	Aff.Sub.Wit.		Ending POH	
√	Verified		(\$8,960.16 is cas	h
√	Inventory		Executor – Not r	е
	PTC		Attornov Notr	~
✓	Not.Cred.		Attorney – Not r	C
✓	Notice of Hrg		Petitioner states	
√	Aff.Mail	w/	condition to be until a sale of re	
	Aff.Pub.		At time of sale p	Э
	T		that upon confi	
	Sp.Ntc.		receipt of all pro	
	Pers.Serv.		real property th	
	Conf. Screen		pursuant to the	
✓	Letters 11/26	/13	Covenant/Condeemed the Lo	
	Duties/Supp		Ray Chance.	
	Objections		ria, eriaries.	
	Video		Wherefore:	
	Receipt		1. Petitione	er
	CI Report		and Rep)(
<u></u>	9202		allowed 2. The cost	
	Order	Х	2. The cost ordered	
			portions	
			at the tir	
			3. For such	
	Aff. Posting		Court m	O
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

WALTER SHERWOOD CHANCE, Executor, is petitioner.

Account period: 07/12/2013-01/31/2015

Accounting - \$175,373.59 Beginning POH - \$165,000.00 Ending POH - \$173,960.16

Executor – Not requested at this time

Attorney – Not requested at this time

Petitioner states: the estate is not in a condition to be closed at the present time until a sale of real property has occurred. At time of sale petitioner would request that upon confirmation of the sale and receipt of all proceeds from the sale of the real property that hose funds be distributed pursuant to the Private Covenant/Contract which has been deemed the Last Will of Decedent, Gene Ray Chance.

- Petitioner requests the First Account and Report of Administrator be allowed and approved as filed;
- 2. The costs of this proceeding be ordered paid by the estate in portions determined by the Court at the time of closing the estate.
- 3. For such other and further order the Court may deem just and proper.

NEEDS/PROBLEMS/COMMENTS:

Note: Executor was appointed with limited IAEA authority and funds to be placed into a blocked account. Any sale of real property would require court confirmation.

Minute Order of 06/30/2015: Counsel represents that she has not received a receipt from her client, but she is attempting to contact him. The court orders that the receipt or a declaration verified by Walter Chance be filed by 07/06/2015.

1. Order appointing personal representative orders all funds of the estate to be placed in a blocked account. Accounting shows income from rents in the amount of \$9,000 and disbursements of \$1,988.33. Supplement to the First Account and Report of Status of Administration of the Estate filed 06/15/2015 states "the cash amounts presently in the Estate are held by Sabine Bank in a blocked interest bearing account" however there is no evidence of a receipt for blocked account having been filed with the court. Need proof of funds placed in a blocked account.

Please see additional page

Reviewed by: LV
Reviewed on: 07/01/2015
Updates:
Recommendation:
File 30 - Chance

30

30 (additional page) Gene Ray Chance (Estate)

Case No. 13CEPR00612

- 2. A Supplemental Inventory and Appraisal was filed 05/28/2015 showing real property located at 3527 Hopewell Rd. Squaw Valley valued at \$100,000.00, this address differs from the real property listed on the Inventory and Appraisal filed 01/10/2014 however both have the same APN number. Also listed is real property adjacent to 35427 Hopewell Rd. Squaw Valley estimated at \$35,000.00 that does not include an APN. It is unclear if the Supplemental Inventory and Appraisal is indeed a Supplemental or is it in fact a corrected Inventory and Appraisal. Need clarification.
- 3. If the material facts have changed, such as the value of the assets, then need amended petition.
- 4. Need Order.

Note: If the petition is granted status hearings will be set as follows:

• Tuesday, 07/05/2016 at 9:00a.m. in Dept. 303 for the filing of the Second account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.